



## Checklist for Retirement Applications

Mark this checklist as you check your retirement application. Missing required information will stop application processing and may delay your first retirement benefit payment. If you have any questions, call 1-888-526-1687.

### **BE CERTAIN ALL THESE DOCUMENTS ARE IN THE ENVELOPE YOU ARE MAILING TO PERF.**

- ☐ Copy of your **birth certificate**. (Copy of a passport may substitute. If you do not have either, call PERF for further instructions.) Missing birth certificate is the number one reason applications are rejected.
- ☐ Copy of **your beneficiary's birth certificate** if you chose pension option 30, 40, or 50 in the application. (Copy of a passport may substitute. If you do not have either, call PERF for further instructions.)
- ☐ Your signature, printed name, and date wherever required on the application.
- ☐ Notarization with signature and date. (Ask for a notary at your bank or city or county offices.)

### **Application for Retirement Benefits**

- ☐ Completed the *Application for Retirement Benefits (State Form 945)*.
  - o **Required** - Pg 1. Complete all member information.
  - o **Required** - Pg 2. *Sign* and select **only one option** on this page.
  - o **Required** - Pg 3. *Sign* and selected **only one option** on this page. If you select Option 2, select one choice for the taxable portion and one choice for the Dec. 31, 1986 tax basis. (If you do not have any contributions prior to Dec. 31, 1986, PERF will ignore this choice and continue processing.)
  - o **Required** - Pg 4. Select and *sign* the appropriate option for distribution of your Annuity Savings Account
  - o Optional - Pg 4. Fill in state withholding choice and *sign*.
  - o **Required** - Pg 5. Fill in any and all beneficiary information for your pension.
  - o Optional - Pg 6. Fill in and *sign* this page to have monthly benefits paid to a revocable trust.
  - o **Required** - Pg 7. *Sign* the application on this page in the presence of a notary.
- **Note: If your application is not notarized the application will NOT be processed.**
- ☐ **Tab 3** – Complete these tax forms if you choose.
  - o If you do not return a completed form, PERF will withhold Federal taxes at the rate of Married with 3 allowances. No State taxes will be withheld unless a completed form is received.
- ☐ **Tab 4** – Complete and *sign* the *Application for Direct Deposit of Recurring Payment (State Form 39175)* if you wish to receive your benefit electronically on or before the 15<sup>th</sup> of each month.

### **Optional document**

- ☐ **Tab 5 – Employer Final Report of Separation from Employment, Wages, and Contributions**
    - o It is extremely helpful to have you employer fill out this information and forward it to PERF as soon as you have left employment. Your retirement benefit processing cannot be finalized without this information.
- Please do not delay sending in your application while waiting for this form. You may give it to your employer who will complete it and send it to PERF separately. PERF will obtain this information for you if you apply more than one month in advance of retirement.

**Please note that additional documents may be requested or required to process and finalize your retirement for benefit payment.**

- ☐ If you choose pension Option 61 on the application, you will need to complete the *Notice to Members Considering the Social Security Integration Option 61* form, which is available from PERF.
- ☐ If you choose pension Option 61 on the application, we will need an estimate from Social Security in order to calculate your benefit.

### **Special cases for retirement benefits**

- ☐ If you are 70 with at least 20 years of service and wish to begin your benefits while still employed, you must complete the *Election to Begin Receiving Benefits - Age 70 (State Form 49285)*, often referred to by PERF as the Millie Morgan form. This form is available from PERF
- ☐ If you are an elected official, age 55 with at least 20 years of service and wish to begin your benefits while still in office, you must complete the *Election to Begin Receiving Benefits – Elected Official (State Form 49287)*, often referred to by PERF as the Elected Official Form. This form is available from PERF



# Refund Application Checklist

This is a checklist to help you complete the refund application. Carefully review the details of the **Application for Refund of Contributions**, fill out the required information, and return the form to PERF. This checklist will help you to ensure that all relevant steps and processes have been completed. *Please note that federal law prohibits PERF from making distributions from the Fund prior to "separation from employment", as referred to in the instructions of the refund application.* If you have any questions please feel free to call 1-888-526-1687.

## Refund Application Page 1:

### Step 1: Member Information

- ☐ Enter your Social Security Number, Date, Name, Address, Phone Numbers and E-Mail Address (if applicable)

### Step 2: Reason for Refund

- ☐ Choose a selection from one of the two reasons for a refund

## Refund Application Page 2:

*Please print your Name and Social Security Number at the top of the page.*

### Step 3: Election for Annuity Savings Account Payment

- ☐ Indicate your selection for the distribution of your **Taxable Portion**
- ☐ If you elect a rollover, indicate the name of an eligible, tax-deferred account that will accept a rollover from a 401(a) plan.
- ☐ Indicate your selection for the distribution of your **Non-Taxable Portion**
- ☐ If you elect a rollover, indicate the name of an eligible, tax-deferred account that will accept a rollover from a 401(a) plan.

## Refund Application Page 3:

*Please print your Name and Social Security Number at the top of the page.*

### Step 5: Certification for Members with 10 or more Years of Creditable Service

- ☐ If you have 10 or more years of service, be sure to read "Step 5." This acknowledgement says that by signing this form, you give up your rights to a pension benefit from PERF and lose your creditable service earned to date.

### Step 6: Member Affidavit and Notarization

- ☐ Please **Sign, Print, Date** and have the application **notarized**.  
Note: If your application is not notarized, it will **NOT** be processed.

## Refund Application Page 4:

*Please print your Name and Social Security Number at the top of the page.*

### Employer's Report of Separation from Employment

- ☐ Please have your employer complete page four. Your refund will **NOT** be processed without this information. Your employer may fax page four to (317) 234-1226. However, the first three pages of this application must be mailed to PERF at 143 W. Market Street, Indianapolis, IN 46204.

Please note that additional documents may be requested or required to process and finalize your refund payment.